

Good financial decisions begin with a plan.

Whether you're preparing for your first home, paying off debt, or planning for the future.

I'd love to help you take the next step.

What You Can Expect

- ✓ Complimentary consultation
- ✓ Personalized financial roadmap
- ✓ Practical guidance focused on your goals



robertroux.com

Mindful Money



Your Money

Your Goals

Your Plan



Why Mindful Money

Most people don't need more financial advice.

They need clarity.

Every day, people are making decisions about buying a home, paying off debt, investing, saving for retirement, and planning for the future.

The challenge isn't finding information. It's knowing which advice applies to your situation. Mindful Money was created to simplify those decisions through practical guidance, personalized planning and ongoing support.

“Can I afford my first home?”

“Am I saving enough for retirement?”

“Where should I start investing?”

Our Mission:

Helping individuals and families make confident financial decisions through education, planning, and accountability.

How Can We Help

Financial Foundations

Help you build a budget that supports your goals, strengthens your cash flow and creates a solid foundation.

Buying Your First Home

Prepare financially before making one of life's biggest purchases with a plan built around your budget and timeline.

Investing Education

Learn the basics of investing and build confidence before putting your money to work.

Financial Planning

Bring everything together into a practical financial plan that grows with you through each stage of life.



MINDFUL MONEY
— FINANCIAL COACHING —
Guidance for today.
Confidence for tomorrow.



1 **CONVERSATION**

We start with a conversation about your goals, challenges, and what matters most to you.



2 **FINANCIAL SNAPSHOT**

We take a clear look at your income, expenses, savings, debts, and investments to understand your full picture.



3 **PERSONALIZED PLAN**

We create a custom plan that aligns with your goals and priorities—built around your life.



4 **TAKE ACTION**

We help you take practical steps toward your goals with clarity and confidence.



5 **ONGOING COACHING**

We stay by your side with regular check-ins, adjustments, and support as life changes.



6 **FINANCIAL CONFIDENCE**

Gain the knowledge, peace of mind, and confidence to build the future you imagine.



MINDFUL MONEY
— FINANCIAL COACHING —
Your goals. Your plan. Your future.
We're here every step of the way.

Is Mindful Money Right For You?

You may be a good fit if:

- ✓ You are saving for your first home
- ✓ You are paying off debt and want a plan
- ✓ You're newly married or starting a family.
- ✓ You're beginning to invest.

You don't have to figure it out alone. The first step isn't having all the answers, it's starting the conversation.

Book a Complimentary Consultation:
robertroux.com